

How to create and submit a travel request in Concur

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Create a travel request



There are 2 ways to create a travel request: from the Concur home page or the manage requests screen.

Option 1: Start your request from the Concur home page



Option 2: Start your request from the Manage Requests screen



From the home page, click **Home** > **Requests** in the upper-left corner.

 Create New Request **Manage Requests** Request Library 125% Remaining a Lodging Test 11/29 Testing the 125% Rule 11/15 How to Guide Flag Errors Training 0 nal Work 2 \$191.50 \$597.50 \$497.50 \$1,202.58 \$5,592.00 \$613.50 Submitted & Pr Rental Car Test 10/20 Rental Car Test mount Remain Pcard Default and TA Test Out of State W . ning Test \$782.50 \$603.50 \$192.50 \$191.50 \$222.50 \$2,844.50 Workflow Check 300% Rule Used Demo Cash Adva Testing TA Error andbox test a Sandbox Test \$51.75 \$553.50 \$571.50 \$103.50 \$327.50 \$243.50 Sent Back to Employee Icons Test 07/03/2023 | 33JK 60 Day Flag Internat Past 60 Days In Past 60 Days Out of State Wo. Past 60 Days I 0 w \$0.00 \$563.50 \$613.50 \$281.50 \$586.00

Click Create New Requests	in the upper-right corner
---------------------------	---------------------------

AP	Concur 🖸 Requests 👻		
a	Create New Request		
	Request Policy *		Red
	*UT Not Integrated with Travel	~	

You'll see a window labeled Create New Request.

The window labeled Create New Request is the **request header**. Fill in the fields and click **Create Request** in the bottom-right corner.

Create New Request				×
				* Required field
Request Policy *	Request Name *		Purpose *	0/500
*UT Not Integrated with Travel				
Employee Identification Number (EIN)	Trip Type *		Start Date *	
	None Selected	~	MM/DD/YYYY	
End Date *	Main Destination City *		Main Destination Country/Region *	
MM/DD/YYYY 💾		~	Search by Country/Region	~
Will this trip include any personal days? *	Personal Travel Dates		Agency Division	
None Selected				
Department * 1	Appropriation Unit *	2	Unit *	3
150 × ~	FHCAA	× ×	0431	× •
Accounting Template * 4				
FINPOSTAUDIT X V				
Comment			Create Dequest	0/500
_			Create Request	
		•		
Tre				
Se				Cancel Create Request
Contact Support				ast signed in: 05/01/2024 03:08 pn

You've arrived at the Expected Expenses screen! Now it's time to add your expected expenses.

How to Guide		Copy Request Submit Request
Not Submitted Request ID: SSHL		
Request Details V Print/Share V Attachments V M	nage Travel Allowance 🗸	
EXPECTED EXPENSES		
Add Edit Delete Allocate		
	No Expected Expenses Add expected expenses and/or travel plans to this request to	
	submit for approval.	

Add the travel allowance

2

Also called per diem or GSA rates, the travel allowance is the set amount a traveler is reimbursed for lodging, meals, and incidental expenses.

You have to add the travel allowance to your travel request to be reimbursed for these expenses.

From the Expected Expenses screen, click the blue text **Manage Travel Allowance** and then click the button **Add Travel Allowance**.

How to Guide Not Submitted Request ID: 33HL Request Details Print/Share Attachment Manage Travel Allowance Add Travel Allowance Add Travel Allowance Add Travel Allowance Add Travel Allowance	Manage Travel Allowance Add Travel Allowance	Copy Request Submit Reque:
No Expe	ected Expenses	
Add expected expenses a	nd/or travel plans to this request to	
suom	r ior approvat	

You'll see a window labeled Travel Allowance. Fill in the fields.

Concur Requests ∽		0
ravel Allowance		:
nerary		
		* Required
Itinerary Name *		
now to duice	Without overnight V	
Start Location *	Start Date * Start Time *	
O Enter City	✓ 03/04/2024	
		*
+ Add Destination	12:00 AM	
Arrival Location *		
Enter City	v	
+ Add Destination		
End Location *	End Date * End Time *	
Enter City	✓ 03/06/2024 Ħ 12:00 AM ()	
· ·		J
		Next: Adjust your travel allowar
Delete Itinerary		Cancel Next

If your destination city doesn't come up automatically, try adding other nearby
 cities. Choose the city that's closest to your destination to make sure the correct rate is loaded.

If you have multiple overnight stays at different locations, check the box **Detailed Itinerary**.

If you're not staying overnight at your destination, check the box **Without overnight**.

When you've filled in all the fields, click **Next** in the bottom-right corner.

Cancel	Next	

View: Adjustments 🗸 Show Filters								
Date/Location	Exclude Day	Breakfast	Lunch	Dinner	Lodging	Use 300 Percent Rule	Allowance Limit 🖗 Re	imbursement Amount
All Days Dates: 4								
Mon, 03/04/2024 St George, UNITED STATES							\$107.00	\$44.2
Tue, 03/05/2024 St George, UNITED STATES							\$107.00	\$59.0
Wed, 03/06/2024 St George, UNITED STATES							\$107.00	\$59.0
Thu, 03/07/2024 St George, UNITED STATES							\$107.00	\$44.2
							Total: \$428.00	Total: \$206.5

Now you'll see the adjustments screen.

On the right side of the adjustments screen, you'll see columns labeled Allowance Limit and Reimbursement Amount.

Allowance Limit shows the reimbursement rate for lodging.

Reimbursement Amount shows the reimbursement rate for meals and incidental expenses.

a stayed overnight w	Allowance	can be excluded from your trip, for exc	ample if you so on personal lea	ave. Abways refer to your com-
Dinner	Lodging	Use 300 Percent Rule	Allowance Limit @	Reimbursement Amount 6
			\$107.00	\$44.2
			\$107.00	\$59.00
			\$107.00	\$59.0
			\$107.00	\$44.2
			Total: \$428.00	Total: \$206.5

Travelers are reimbursed 75% of the reimbursement rate for meals and incidental expenses on the first and last day of travel.

If you shouldn't be reimbursed for lodging or meals for a specific day, check the boxes to exclude those days from your travel request.

For example, if Monday is a personal travel day, check the box under **Exclude Day** for Monday. And if lunch will be provided at your conference on Tuesday, check the box under **Lunch** for Tuesday.

Travel Allowance								
Travel Allowance								
Adjustments								
ere you can declare any free meals rec any policy guidelines.	ceived to reduce your daily allow	ance. You can also claim ado	litional allowances, for exam	nple if you stayed overnight wi	th friends or family. Days	can be excluded from your trip, for exi	imple if you are on personal le	ave. Always refer to your com-
lew: Adjustments V Show Filters								
Date/Location	Exclude Day	Breakfast	Lunch	Dinner	Lodging	Use 300 Percent Rule	Allowance Limit 😜	Reimbursement Amount 😡
All Days Dates: 4								
Mon, 03/04/2024 St George, UNITED STATES							\$107.00	\$44.25
Tue, 03/05/2024 St George, UNITED STATES							\$107.00	\$59.00
Wed, 03/06/2024 St George, UNITED STATES							\$107.00	\$59.00
Thu, 03/07/2024 St George, UNITED STATES							\$107.00	\$44.25
							Total: \$428.00	Total: \$206.50
Back								Cancel Finis
Status (US2)								Last signed in: 11/08/2023 0

If the cost of your hotel is more than per diem, check the box **Use 300% Rule**.

For example, if the per diem rate for your destination is \$105 per night but the lowest rate in the area is \$110 per night, you would check the box Use 300% Rule in your travel request and reimbursement request.

S	AP Concur 🖸 Requests 👻								0	К
Ma	Travel Allowance								×	
	Adjustments		Llas 2		aant Di					I
	Here you can declare any free meals received pany policy guidelines.	to reduce your daily allow	Use 5	uu Per	Cent Ri	anity. Dense	an he excluded from your trip, for ex	ample if you are on personal leav	ve. Always refer to your com-	
	View: Adjustments V Show Filters									I
	Date/Location	Exclude Day	Breakfast	Lunch	Dinner	Lodging	Use 300 Percent Rule	Allowance Limit 🚱	Reimbursement Amount 🔞	I
	All Days Dates: 4									l
	Mon, 03/04/2024 St George, UNITED STATES							\$107.00	\$44.25	l
	Tue, 03/05/2024 St George, UNITED STATES							\$107.00	\$59.00	l
	Wed, 03/06/2024 St George, UNITED STATES							\$107.00	\$59.00	l
	Thu, 03/07/2024 St George, UNITED STATES							\$107.00	\$44.25	l
								Total: \$428.00	Total: \$206.50	I
Т	Back								Cancel Finish	J
Se	rvice Status (US2)								Last signed in: 11/08/2023 01:11	pm

If you select any boxes under **Use 300 Percent Rule**, the total is automatically calculated and shows 300% of the reimbursement rate in the Allowance Limit column even though your hotel may not be that expensive.



When you're done, click **Finish** in the bottom-right corner.

Back at the Expected Expenses screen, you'll see the travel allowance has been added.

tails↓↑	Date↓₹	Amount‡† F	Requested ↓ ↑	
George, Utah	03/04/2024 - 03/07/2024	\$206.50	\$206.50	~
			\$206.50	
G	ilis↓† eorge, Utah	eorge, Utah 03/04/2024 - 03/07/2024	iiis1 Date↓ ²⁷ Amount↓1 eorge, Utah 03/04/2024 - 03/07/2024 \$206.50	Date P Amount1 Requested 1 eorge, Utah 03/04/2024 - 03/07/2024 \$206.50 \$206.50 \$206.50 \$206.50 \$206.50

Add other expected expenses

From the Expected Expenses screen, click Add.

	How Not Sub Reques	v to Guide	Manage Travel Allowance V		Copy Requ	est Submit Re	equest
	Add	dit Delete Allocate					
	Ο	Expense type↓↑	Details↓↑	Date↓ [╤]	Amount↓↑	Requested ↓ ↑	
6		Travel Allowances	St George, Utah	03/04/2024 - 03/07/2024	\$206.50	\$206.50	~
						\$206.50	

Add expected expenses and/or travel plans × Search for an expense type 5.50 ✓ 01. Travel Expenses Friends & Family Allowance Use the search bar to search for Hotel Reservation ✓ 02. Transportation Expenses the expense, or select the expense Air Ticket from the drop-down menu. Airline Fees Car Rental Fuel Reimbursement For this example, we'll select Parking Reimburse Personal Car Mileage Personal Car Mileage. Public Transpor Railway Ticket Taxi/Rideshare O3. Meals

You'll see a data entry screen for the expense. Fill in the fields.

Mileage Calculator Transaction Date *		Description		
03/04/2024	8			
Comment				
	11			
From Location 🚱		To Location 🚱		
Distance *		Transaction Amount	Company	
0			US, Dollar	
Reimbursement Rates				

In the **Description** field, enter why the expense is needed. For example, "Drive to airport for flight."

ransaction Date *	B 1.1		Description		
05/04/2024	Description				
omment		-			
rom Location 👔			To Location 👔		
			Transaction Amount	Currency	
Distance 1				US, Dollar	
0					
0 teimbursement Rates					
			Transaction Amount	Currency US, Dollar	

If the expense has **small blue text** below the title, click on the text to add more information to the expense.

New Exp 03/04/2024	ense: Personal Car Mileage	
Mileage Calco 03/04/2024 Comment	Mileage Calculator	Description
From Location 🕢	A	To Location 🕑

When all the fields are filled, click **Save**.

	Cancel Save
Description	
Drive to airport for flight	
]	۵
To Location 🚱	
Salt Lake City International Airport (SLC), W Terr	ninal Dr, Salt Lake City, UT 84122, USA
Transaction Amount 36.08	US, Dollar
	Description Drive to airport for flight To Location Salt Lake City International Airport (SLC), W Terr Transaction Amount 36.08

Back at the Expected Expenses screen, you'll see the expense has been added. To add another expense, click **Add**.

Hov Not Sub	v to Guide \$242.5	8 🗇		Copy Requ	est Submit Reque
Reque	it Details ✓ Print/Share ✓ Attach	ments 🗸 🛛 Manage Travel Allowance 🗸			
EXPE	ECTED EXPENSES				
Add	Edit Delete Allocate				
	Expense type↓↑	Details↓↑	Date↓≓	Amount 1	Requested ↓↑
	Travel Allowances	St George, Utah	03/04/2024 - 03/07/2024	\$206.50	\$206.50 💊
	Personal Car Mileage	den, UT, USA - Salt Lake City International Airport (SLC). W Terminal Dr, Salt Lake City, UT 84122, USA	03/04/2024	\$36.08	\$36.08
					\$242.58



Follow the steps below to learn how to use the mileage calculator or skip to another section:

How to add attendees to an expense Alerts and errors Submit the travel request

How to use the mileage calculator

In the personal car mileage data entry screen, click the small blue text Mileage Calculator.

New Expense: Personal Car Mileage		Cancel Save
O3/04/2024	lator	
Comment		<u>~</u>
From Location 🕖	To Location 🕑	
Distance * 0 Reimbursement Rates USD 0.44 per mile Store Cancel	Transaction Amount	Currency US, Dollar

In **box A** enter your starting location. In **box B** enter your destination.

If you'll drive back to the address in box A after your trip, click the blue text **Make Round Trip**.



Back at the data entry screen, you'll see the fields populated with the information from the mileage calculator.

Z Mileage Calculator Transaction Date *	Description		
03/04/2024	8		
Comment			
From Location 🚱	To Location 🚷		
From Location 🕜 Ogden, UT, USA	To Location 👔 Sait Lake City Internation	al Airport (SLC), W Terminal Dr, Salt Lake City, UT 84122, USA	
From Location @ Ogden, UT, USA Distance *	To Location 🕢 Salt Lake City Internation Transaction Amount	aal Alrport (SLC), W Terminal Dr, Salt Lake City, UT 84122, USA Currency	
From Location @ Ogden, UT, USA Distance * 82	To Location @ Salt Lake City Internation Transaction Amount 36.08	aal Airport (SLC), W Terminal Dr, Salt Lake City, UT 84122, USA Currency US, Dollar	
From Location	To Location 🕢 Salt Lake City Internation Transaction Amount 36.08	aal Airport (SLC), W Terminal Dr, Salt Lake City, UT 84122, USA Currency US, Dollar	
From Location @ Ogden, UT, USA Distance * 82 Reimbursement Rates	To Location 🚱 Salt Lake City Internation Transaction Amount 36.08	al Airport (SLC), W Terminal Dr, Salt Lake City, UT 84122, USA Currency US, Dollar	
rom Location @ Ogden, UT, USA Distance * 82 Reimbursement Rates Savo Cancel	To Location 🚱 Salt Lake City Internation Transaction Amount 36.08	al Airport (SLC), W Terminal Dr, Salt Lake City, UT 84122, USA Currency US, Dollar	
From Location @ Ogden, UT, USA Distance * 82 Reimbursement Rates Save Cancel	To Location Salt Lake City Internation Transaction Amount 36.08	al Airport (SLC), W Terminal Dr, Salt Lake City, UT 84122, USA Currency US, Dollar	

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How to add attendees to an expense



If you add registration fees or a business meal to your travel request, you need to add attendees to the expense.

In the expense data entry screen, click the small blue text **Attendees**.

New Expense: Registration Fees	Cancel	Save	
Transaction Amount * Comment			
Save Cancel			

	SA	P Concur 🖸 Requests 👻
	Ma	Attendees
You'll see a window labeled Attendees.		Registration Fees \$200.00
labeled Attendees.		Attendees: 0
Click Add .		Add Remove Create Group

You'll see a new window labeled Add Attendees.

From the **Attendee Type** drop-down menu, select **Employee** if the attendee is a state employee or select **Business Guest** if the attendee isn't a state employee.

SAP Co	Add Attendees						>	(ک
Ma Atte	Attendees	S Recent Attendees	8 Attendee Groups			1		×
Atte	Attendee Type *			Attendee Typ)e î		* Required field	
	Business Guest			Company				
	Employee							
	Spouse/Partner						Can't find an attendee? Create New Attendee Search Reset Close	

If the attendee is a state employee

In the Add Attendees window, enter the employee's name and click **Search**.

SAP Co	Add Attendees					×	Ð	K
Atta	8 Attendees	ව Recent Attendees	Attendee Groups				×	
Atte	Attendee Type * Employee Attendee Title			×	Name Prot Name	j		
	Country/Region Search by Count	ny:Region		~	Search	•		

Select the employee from the list and click **Add to List**.

SAP	Co	Add Attendees								× 🤉
Mai	Atte Regi	8 Attendees	S Recent Attendees	Attendee Groups						×
	Atte	Search Criteria: Emplo Modify Search	iyee, amel↑	Email Add	ress11	Country/Region 11	Attendee Title⊥↑	Add to List	Attendee Tvpe↓↑	
		<u>h</u>	nda B	kialing	@utah.gov	UNITED STATES		Add to List	imployee	
		9							Add to List C	se
						Add attendees to associate wi	ə ith this expense.			

You'll see a green check mark that says Attendee added. Click **Close**.

P Co	dd Attendees	×	3
Att Reg	Attendees Symptotic Recent Attendees Attendee Groups		×
Atte	Attendee added:		
	Attender Type * Last Name First Name		Jî
	Employee	L	0
	Attendee added: Email Address Close	L	
	Country/Region Search by Country/Region	۰.	
	Search Reset Cit	ie	

Back in the Attendees window, you'll see the name of the person you added. Click **Save** to return to the data entry screen.

	Concur C needucoto				(?) K
ма	Attendees				×
8	Registration Fees \$200.00				
,	Attendees: 1				
	Add Remove Create Group	_			
	Attendee Name†=	Attendee Title↓↑	Company↓↑	Attendee Type↓↑	Amount↓↑
				Employee Sa	\$200.00
11-					
_					`````````````````````````````````
TF					
Servic	se Status (US2)				d in: 11/

If the attendee isn't a state employee

			×
Last Name Company		First Name Create Nev	* Required field v Attendee Can't find an attender ? Create New Attendee Search Reset Close
Create New Attendee ← Go back		* Required field	You'll see a new windo
Attendee Type * Business Guest	Attendee Title *		labeled Create New Attendee.
First Name *			

Click the small blue text **Create New Attendee**.

You'll see a green check mark that says Attendee added.

Click the small blue text **Go back**.

Create New Attendee			×	
← Go back Attendee added:	← Go back			
			* Required field	
Attendee Type *	Last Na	ame *		
Business Guest	~			
First Name *	Attende	ee Title *		ee
Company *			3	s G
		Ca	ncel Create Attendee	

14

Back at the Add Attendees window, click **Close**.

Attendees	S Recent Attendees	Attendee Groups					
Attendee Type * Business Guest			~	Last Name	 irst Name	Close	* Required fi
Business Guest Employee				Company			
Spouse/Partner						Can't find an atte	ndee

Back in the Attendees window, you'll see the name of the person you added.

Click **Save** to return to the data entry screen.

SA	^o Concu	r 🖸 Requests 👻					(?) K
Ма	Attende	ees					×
1	Registrati	ion Fees \$200.00					
	Attendee	s: 1					
	Add	Remove Create Group					
		Attendee Name†≞	Attendee Title↓↑	Company↓↑	Attendee Type↓↑	-	Amount↓↑
	0	Callonag Namita B			Employee	Save	\$200.00
_							7
TH	ice Status	(1152)					Canc I Save
0011	ice blatab	(002)					0111.22

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Alerts and errors

Alerts and errors appear at the top of your travel request.

All 😣	1 🛕 2
Expense	Rental Car Reimbursement 03/21/2024 \$35.00
😢 A miss	ing receipt affidavit is not allowed for this type of expense. Please contact the merchant to get a copy of the receipt. View
Expense	Personal Car Mileage 03/18/2024 \$265.32
🛕 Mileag	e between the home address and primary work address is considered a commute and commute mileage cannot be claimed. View
Expense	Taxi/Rideshare 08/28/2023 \$12.99



Alerts are represented with the orange triangle icon. Alerts give helpful information about policy and appear even if you've followed policy. **Alerts don't go away**.

For example, if you add a personal mileage expense, you'll see an alert that says, "Mileage between the home address and primary work address is considered a commute and commute mileage cannot be claimed." This alert is just a reminder that you can't be reimbursed for commute mileage.

You **can** submit your travel request if you see an alert.



Errors are represented with the red circle icon. An error icon means there's a problem with your travel request that needs to be fixed before you can submit it. **Once you fix the problem, the error message will disappear**.

You **can't** submit your travel request if you see an error.

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Submit the travel request

From the Expected Expenses screen, click **Submit Request**.

Request	Details 🗸	Print/Share V Attachments V Mana	ge Travel Allowance 🗸	Submit Doquast	/	7	
Add	Edit (Delete Allocate		Submit Request			
	Alerts↓↑	Expense type↓↑	Details↓↑	Date↓≓	Amount↓↑	Requested↓↑	
		Travel Allowances	St George, Utah	03/04/2024 - 03/07/2024	\$206.50	\$206.50	~
	F	Hotel Reservation	St George, Utah	03/04/2024	\$400.00	\$400.00	
	F	Air Ticket	Salt Lake City (SLC) - Denver (DEN) : Round Trip	03/04/2024	\$150.00	\$150.00	
	F	Car Rental	Denver, Colorado - Denver, Colorado	03/04/2024	\$75.00	\$75.00	
	F	Fuel Reimbursement	I need to return the rental car full	03/04/2024	\$70.00	\$70.00	
\bigcirc	Þ	Parking Reimbursement	I have to drive myself to the airport and pay for parking	03/04/2024	\$30.00	\$30.00	
	P	Registration Fees Attendees (1)	I need to attend this conference to better understand my job.	03/04/2024	\$200.00	\$200.00	
						\$1,131.50	

You'll see your request in the Request Library. It shows your request is submitted and pending cost object approval, which means it's been sent to the budget officer for approval.

You'll receive an email when your travel request is approved.

Request Library					View Active Requests Create New Reque
How to Guide 03/04/2024 33HL \$1,167.58 (Submitted	Flag Errors Training 02/19/2024 33GT \$5,592.00 (Returned)	•	Training Runthrow 02/05/2024 33H4 \$0.00 Not Submitted	International Work 2 01/29/2024 33FL \$613.50 Not Submitted	International Workflow 01/15/2024 33F7 \$603.50 (Approved)
Pending Cost Object Approval Out of State Workflow 01/08/2024 33F4 \$192.50 (Approved)	Selvent to Employe Rental Car Test 10 12/25/2023 33DW \$355.00 (Not Submitted)	ow to 3/04/20 5 1,1 ubmitt	Guide 024 33HL L67.58	ŧ	Pcard Default and TA Test 11/13/2023 33C6 \$2,844.50 (Approved)
Workflow Check 11/09/2023 33FD \$51.75 (Approved)	Weekend, Commu 1/05/2023 33C4 \$185.60 Approved	ending	g Cost Object Approv	ral	Testing TA Error 10/09/2023] 337J \$103.50 (Approved)
			Sent Back to Employee		

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